
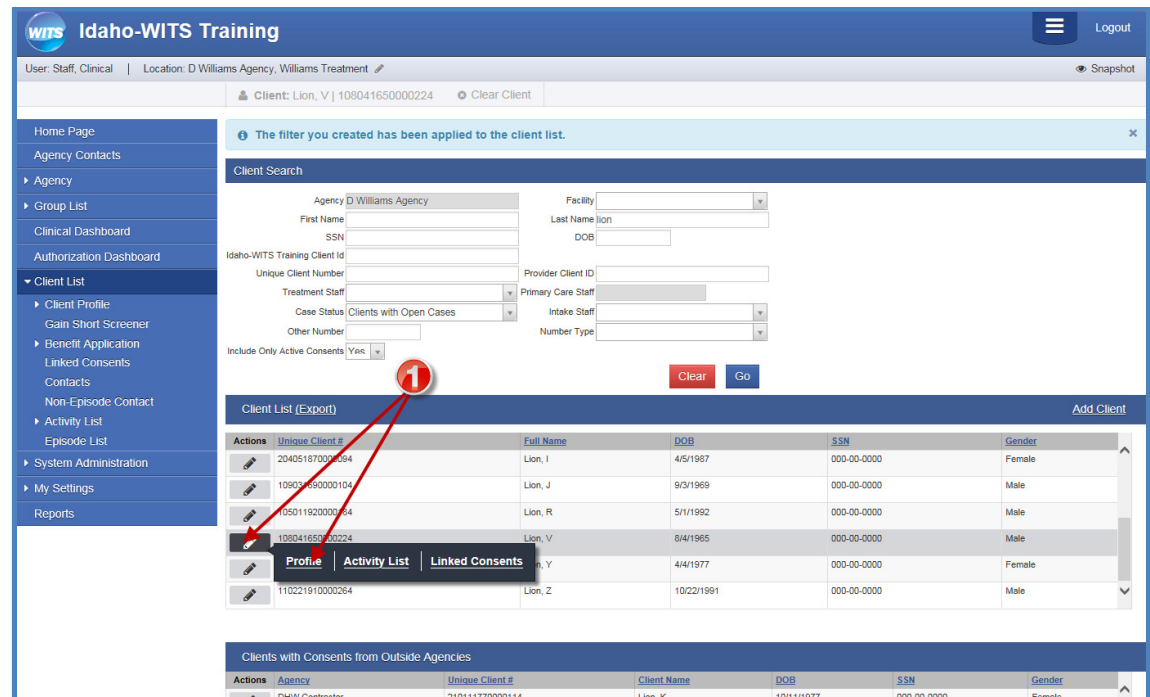


Authorization Change Request – Note to Authorizer for ATR 4 Clients who are Transferring to Another Agency

These instructions are to be used in the following Situations.

- Transfer an ATR 4 client from **Assessment to a treatment Level of Care (LOC) at a different agency.**

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, click  and select **Client Profile**.



The screenshot shows the Idaho-WITS Training interface. The top navigation bar includes the WITS logo, the text "Idaho-WITS Training", and a "Logout" button. Below this, a breadcrumb trail shows "User: Staff, Clinical" and "Location: D Williams Agency, Williams Treatment". A search bar contains "Client: Lion, V | 108041650000224" and a "Clear Client" button. A notification banner states "The filter you created has been applied to the client list." The left sidebar contains a navigation menu with options: Home Page, Agency Contacts, Agency, Group List, Clinical Dashboard, Authorization Dashboard, Client List (selected), Client Profile, Gain Short Screener, Benefit Application, Linked Consents, Contacts, Non-Episode Contact, Activity List, Episode List, System Administration, My Settings, and Reports. The main content area is titled "Client Search" and contains various filters for Agency, Facility, First Name, Last Name, SSN, DOB, Idaho-WITS Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status, Intake Staff, Other Number, and Number Type. Below the filters is a "Client List (Export)" table with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table lists several clients, with the client "Lion, V" (Unique Client # 108041650000224) highlighted. A red circle with the number 1 is placed over the pencil icon in the Actions column for this client. Below the table is a section titled "Clients with Consents from Outside Agencies" with a similar table structure.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	204051870000394	Lion, I	4/5/1987	000-00-0000	Female
	108031590000104	Lion, J	9/3/1969	000-00-0000	Male
	050119200000404	Lion, R	5/1/1992	000-00-0000	Male
	108041650000224	Lion, V	8/4/1965	000-00-0000	Male
	4441977	Y	4/4/1977	000-00-0000	Female
	110221910000254	Lion, Z	10/22/1991	000-00-0000	Male

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender
	DWILLIAMS	210141370000144	Lion, K	10/14/1977	000-00-0000	Female

2. Select the **Authorization** on the Navigation Pane

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Generate Report | Snapshot

Client: Lion, V | 108041650000224 | Clear Client

Profile

First Name: V | Middle Name: | Last Name: Lion | Suffix: | Gender: Male | DOB: 8/4/1965 | SSN: 000-00-0000 | Provider Client ID: | Unique Client Number: 108041650000224 | State Client ID: | Record Created By: Buskey, Michelle | Last Updated By: Buskey, Michelle | Created Date: 3/4/2015 1:20 PM | Last Updated Date: 3/4/2015 1:20 PM

Driver's License: | Ac: Category: | Has paper file: Yes


Administrative Actions: | Cancel | Save | Finish | ➔

Alternate Names | Add

Actions	Last Name	First Name	Middle Name	Client Alias Type

Addresses | Add




Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	1205 Venus Circle Nex Perce, ID 87206	No	3/4/2015	3/4/2015

3. Click  and select **Profile** to review the active Authorization.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Snapshot

Client: Lion, V | 108041650000224 | Clear Client

Authorization List | Add New Authorization Record

Actions	Auth #	Payer	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
	3389	ATR4 [ATR4, 7919BPA]	Active	4/17/2015	4/30/2015	\$961.80	\$0.00	\$0.00	\$961.80	4/17/2015
	2036	FW Adult [State General, 1]	Closed	7/1/2014	3/18/2015	\$0.00	\$0.00	\$0.00	\$0.00	3/18/2015
	2036	CHW Adult [State General, 1]	Closed	7/1/2014	4/17/2015	\$0.00	\$0.00	\$0.00	\$0.00	4/17/2015

4. Click **Requests** under the Actions box.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment

Client: Lion, V | 108041650000224

Snapshot

Home Page

Agency Contacts

Agency

Group List

Clinical Dashboard

Authorization Dashboard

Client List

Client Profile

Alternate Names

Additional Information

Military Information

Contact Info

Collateral/Cust. Contacts

Other Numbers

History

Client Group Enrollment

Authorization

Employment

Allergies

Gain Short Screener

Authorization

Group Enrollment: ATR4 | Status: Active

Plan: ATR4 | Contract: 7919BPA - DHW-D Williams (ATR4) / 12/1/2014 - 9/29/2017 - ATR4-ATR4

Authorization #: 3389 | Date Approved: 4/17/2015

Administering Agency: A Managed Service Contractor | Updated Date: 4/17/2015 1:10 PM

Effective Date: 4/17/2015 | Updated By: Buskey, Michelle

End Date: 4/30/2015 | ATR Intake: 4/17/2015-Williams Treatment

Comments

Authorized Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Outpatient	25	\$231.00	\$0.00	\$0.00	25.00
Drug/Alcohol Testing	25	\$337.50	\$0.00	\$0.00	25.00

Actions

Close

Requests

Total Authorized: \$568.50

Total Encumbered: \$0.00

Total Expended: \$0.00

Total Available: \$568.50

Finish

5. The Authorization Change Request List displays. Click **Add New**.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment

Client: Lion, V | 108041650000224

Snapshot

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Client Group Enrollment

Authorization

Provider Authorization Change Request

Group Enrollment: ATR4 | Status: Active

Plan: ATR4 | Contract: 7919BPA - DHW-D Williams (ATR4) / 12/1/2014 - 9/29/2017

Authorization #: 3389 | Date Approved: 4/17/2015

Effective Date: 4/17/2015 | Updated Date: 4/17/2015

End Date: 4/30/2015 | Updated By: Buskey, Michelle

ATR Intake: 4/17/2015-Williams Tre

Comments

Authorization Change Request List

Actions	Date	Type	Service	Units	End Date	Status	Justification

Add New

Finish

6. The Authorization Change Request List displays. Select **Note to Authorizer**.

7. Enter **Comments**.

- **Transfer an ATR 4 client from Assessment to a treatment LOC at a different agency:** document the date the GRRS is consented to DHW Contractor, and include the recommended LOC.

8. Click **Save** and **Finish**.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Snapshot

Client: Lion, V | 108041650000224 | Clear Client

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Authorization
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Allergies

Authorization Change Request Profile

Type: [Note to Authorizer] (6) Select the Type of Note To Authorizer

Service: []
Units: []
End Date: []
Justification: []
Requestor Comments: []
Approver's Comments: []
Deny Reason: [] Other Description: []

Actions: [Add ASAM Concurrent Review]

Cancel Save Finish

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Snapshot

Client: Lion, V | 108041650000224 | Clear Client

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Authorization Change Request Profile

Type: [Note to Authorizer]

Service: []
Units: []
End Date: []
Justification: []
Requestor Comments: [] (7)

Approver's Comments: []
Deny Reason: [] Other Description: []

Actions: [Add ASAM Concurrent Review]

Cancel Save Finish (8)